



NC E-Procurement
Paperless Purchasing
FBS Summer Conference
July 2015



“We have experienced a significant improvement in our purchasing efficiency by using NC E-Procurement. The system is easy to learn and we have benefited by moving from a paper-driven system to a system that enables us to process and track orders electronically.”

- More than **4.5 Million** purchase orders and over **\$32 Billion** in spend has processed through the NC E-Procurement system
- Over **10,000** NC users from almost **200** different entities currently use NC E-Procurement.
- Over **50,000 vendors** are registered in the NC E-Procurement system.



NC E-Procurement provides the tools to improve the way the State of North Carolina purchases goods and services.

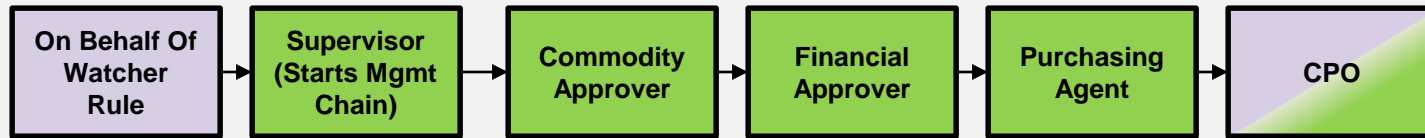
- There are more than **450 electronic catalogs** representing over 135 Statewide Term Contracts available to users
- Users are empowered to use online requisitioning with direct access to State Term Contracts via **online catalogs**
- Orders and internal approvals are **routed electronically** and maintained for accountability – **paper free!**

Since March 2014, the Division of Purchase and Contract announced several new Statewide Term Contracts:

- **615A** – Office Supplies was awarded to Forms & Supply and is projected to offer 31% savings on general office supplies.
- **645A** – Office Paper is expected to generate a 9% savings on office paper over historical purchases. Tiered pricing adds further discount opportunities for larger volume orders.
- **445B** – Maintenance, Repair, and Operations (MRO) was awarded to Grainger. It consolidated several previously separate contracts.
- And Fuel contracts:
 - 405A – Propane
 - 405B – Diesel
 - 405 - Gasohol

- NC E-Procurement online catalogs provide an online shopping experience to the end user, which includes:
 - The ability to search for a specific item on Statewide Term Contract
 - The ability to conduct a side-by-side item comparison
 - The ability to note commonly ordered items as “favorites”, allowing quick access in the future
- Catalog line items are pre-populated with Pricing, Contract, Commodity, and Supplier Specific information, allowing end users to quickly add the items to their requisition and Suppliers to quickly process the purchase orders

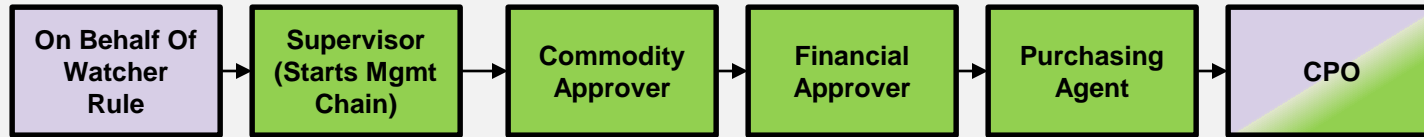
Approval flow rules work together to route requisitions based on entity selections.



- Automated approval flows add **watchers**, for awareness, or **approvers**, for approval action
- User profiles include a **supervisor** and a **dollar approval threshold**, so that requisitions over the dollar threshold are routed to that user's supervisor. This continues until a supervisor with an approval threshold over the requisition amount approves it.
- **Commodity approvers** with specialized expertise, such as IT, can be set using a combination of commodity code and dollar approval threshold.
- **Financial approvers** can review requisitions over a dollar threshold. Entities can have one financial approver or divide the responsibility by account code.

Explanation of Rules

Approval Flow Summary



- **Purchasing Agent approvers** can be one role or divide the responsibility by commodity.
 - Purchasing Agents approve all non-catalog requisitions to enable compliance.
 - Optional setting allows purchasing agents to approve **catalog-only requisitions over a set dollar threshold**, as catalog items are pre-populated with supplier ordering information.
- Chief Procurement Officer can be added to flow as a **watcher or an approver based on a dollar threshold**. Requisitions can be sent to a single CPO role or can be routed based on the commodity.
- The Commodity, Financial, Purchasing and CPO approvers are **group-based**. All requisitions received for approval can be approved by any user in that group.



Approval Flow Demo

NCE-Procurement@your service

ARIBA®

SPEND MANAGEMENT

Home

Create

Search

Manage

Recent

Preferences

Home | Help | Logout

Welcome ccsupervisor01 ccsupervisor01

RQ18364984 - Approval Flow Test

Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You may also print the details of the request. Review your request ...

Back

Edit

Approve

Deny

Print

Summary

Approval Flow

Orders

Receipts

History

Title: Approval Flow Test

Transmit To Supplier? ☒

My Labels: [Apply Label...](#)

Line Items (1)

No.

Type

Description

1

Paper, Dual Purpose, White, Husky/Quickcopy, ...

Supplier Part Number

Qty

Unit

Tax

Other

Price

Amount

1120HXA

5

carton

\$9.4955 USD

\$0.00 USD

\$27.13 USD

\$145.15000 USD

Contract ID: 645A

Supplier: MAC PAPERS INC.

Location: MAC PAPERS-Greensboro

Commodity Code: 645-21 - Bond Paper (Includ...

Account Code: 1234

Paper, Dual Purpose, White, Husky/Quickcopy, Xerographic, 8.5 x 11, 20 lb, Virgin, 10 Rms/Ctn (THIS CONTRACT CONTAINS TIER PRICING. YOU MUST ORDER A TOTAL QUANTITY OF 1-39 CARTONS TO OBTAIN THIS PRICE.) (Contract Line # A1)

Detail

Total Cost: \$145.15000 USD

- The NC E-Procurement Team will work with the individual LEA to understand the current signature process and create a customized approval flow.
- The school system can review how this will work in the training environment prior to implementing in the live environment.

- **10 Web Based Trainings & 40 Job Aids**
 - *Self-paced online training modules*
 - *Printable job aids with screenshots*
 - *<http://eprocurement.nc.gov/Training.html>*
- **Onsite Training**
 - *Free on an as needed basis*
 - *eptraining@doa.nc.gov*
- **Dedicated Training Environment**
 - *Hands on experience for new users or trying Approval Flows*

***The NC E-Procurement Help Desk is
manned by highly-trained and friendly IT
customer service agents dedicated to
serving you!***

Agents are available for assistance

7:30am – 5pm

Monday through Friday

888-211-7440, Option 1

ephelpdesk@its.nc.gov



“The NC E-Procurement system has been a very productive change for our school system. We are very pleased with placing our orders for the schools and the turnaround time for our orders being delivered.”